



POSITION DESCRIPTION  
**Social Work/Customer Service Representative/  
Representative Payee Specialist**

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**Position:** Social Work/Customer Service Representative/ Representative Payee Specialist

**Responsible to:** Director of Client Relations

**Employment status:** Part to Full-time hourly staff

**Hourly compensation:** starting at \$11.00

**General Description:**

This individual will help a diverse client population that includes individuals with varying degrees of disabilities and challenging life circumstances in Kalamazoo and Battle Creek manage their limited finances and assure that they have housing, food, clothing and medical care. This position serves as a payee for Social Security, VA, and DHS benefits. Requires excellent people skills, ability to operate computer, and ability to help develop simple budgets. Some local travel is required.

**Specific Responsibilities:** The person is ultimately responsible for the following duties:

- Manage the beneficiary's social security or as legal custodian veterans' administration income: SSA, SSI, VA or FIA funds
- Dedicated SSI Accounts-work with SSI to maintain dedicated money in outside bank account and provide bookkeeping with bank statements to keep computer up-to-date with balances
- Meet with new clients to establish initial budget and inform of agency policies. If the client has a Guardian and/or case manager, payee works with the guardian
- **Budgets maintenance** – Budgets need to be updated annually. Payee will give budget to guardian worker (if one) to approve or revise; then payee worker will update in computer
- Interact with clients and staff on a regular basis and work to constructively resolve problems
- **Payment plans**-payee works with the guardian worker to establish a payment plan, then payee will work with bookkeeping to set up and maintain
- Check requests – payee worker will review the billing open/budget before processing special check requests received by client. If client has a guardian, the guardian worker will review the budget/billing open then give the request to the payee worker to enter

- As needed, distribute checks at off-site location
- File bills and other client related information as required
- Refer all complaints from or regarding clients to Supervisor of the Rep. Payee Program
- Communicate client information to other staff members on an “as needed” basis
- Make recommendations to the Supervisor of the Rep. Payee Program for improvements concerning internal operations
- Provide general administrative support to the Kalamazoo office:
  - Act as a backup for the front desk staff, greeting visitors and handling telephones as needed in Kalamazoo office
  - Assist bookkeeping with check production and distribution
  - Assist the Clinical Support Specialist, Conservator Support Specialist, and Clinical Case Aide with routine tasks
- Cross-train with other clinical support staff and provide coverage during vacations and other absences
- Other duties as assigned
- Limited local travel required

### **Qualifications:**

- Minimum of high school diploma with 2 years related experience required; Associates Degree in Human services field preferred
- Ability to communicate effectively, both orally and in writing
- Demonstrated telephone, keyboard and computer skills
- Ability to work with clients with various disabilities
- Valid Michigan driver’s license with own transportation

This description is intended to indicate the kinds of responsibilities that will be required of the incumbent. It shall not be held to exclude other duties not mentioned that are of a similar nature.

**Send resumes to Martha Morgan, Director of Client Relations** (mail, fax or email).  
Please write “Resume” in the subject line.

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**Deadline to apply:** June 19, 2012

*Any inquiries may be directed to Martha Morgan, (269) 963-3253 ext. 434*